

Partner Tools

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PCC Users Conference 2016



Partner Logging Utilities

Overview: Partner logs many of the configuration changes that are made within the application. Some of these changes are accessible via interfaces that are available to the user. We will be looking at two of these -

1. The Table Log Program - (tablelog)
2. The Policy Log Program - (policylog)

Table Log (tablelog)

- Allows a user to search for changes made in Partner's Table Editor (ted) menu.
- Presents output containing the table, entry, user, timestamp, and specifics of the changes made.
- Restriction criteria based on Date Range, Time, Users, Tables, Entries, and on the type of modification that was made to the table (Additions, Deletions, Edits).
- Sortable by User and Table.

Table Log

For Dates: 04/01/11 to 04/04/11

For Times: 12:00am to 11:57pm

For All Users? Yes
For All Tables? Yes
All Table Entries? Yes

Include:

☒ Additions
☒ Edits
☒ Deletions

Sort By

1.
2.

Generate
Report

TABLE LOG AUDIT REPORT

From: 04/01/11 To: 04/04/11

Generate On: 04/04/2011

Date	Time	Table	(#)Entry Name	User	Action Method
04/04/20	11:50am	Reasons	(8)Well Visit	joan	Modify Ted
BEFORE: Provider Visit Length 2 (Williams): 30.00					
AFTER: Provider Visit Length 2 (Williams): 20.00					
04/04/20	11:50am	Procedures	(4)OV Expanded Focus	joan	Modify Ted
BEFORE: Price Sch A: \$79.00					
AFTER: Price Sch A: \$95.00					

Criteria for this report:

Date Range: 04/01/11 to 04/04/11

Time Range: 12:00am to 11:57pm

Including Users:

All

Done

Jump to
TopJump to
BottomSend
To...Search
Pattern

Policy Log (policylog)

- Allows a user to review the changes made to a policy (or policies) for a specific patient.
- Contains information for changes as far back as 2007.
- Contains 'before' and 'after' information about the policy in question, as well as details about the change that was made (user, timestamp, type of change).
- Can be accessed through the policy screen, or as a standalone program.

Insurance Policies
Pebbles Flinstone

Copay	Insurance Company	Certificate #	Group #
10.00	UnitedHealthcare \$10	24265123406	5546BUH
10.00	Aetna MC \$10 Box 1125	8282452320302	413BC5
0.00	Medicaid	232124322	
20.00	(Expired) BCBS \$20 Empire	14142305	BC123

Press the Right Arrow Key for More Information

~~UnitedHealthcare \$10 / UnitedHealthcare / Private Insurance~~

P.O. Box 740800

Atlanta, GA 30374-0800

Payor ID:

Phone: 1-800-511-4747

SUBSCRIBER

First: Wilma

Last: Flintstone

Address: 479 Cocoa Avenue

Plymouth, VT 05056

Birth:

Sex: Female

Reln: Child

Employr:

Start: 10/01/2006

End:

Scroll
Backward

Scroll
Forward

Edit
Policy

Insert
Policy

Move
Policy

Delete
Policy

Expire
Policy

Full Insurance Plan Notes

Press **F4** for Policy Change Log

Copay Insurance Company
10.00 UnitedHealthcare \$10

Certificate #
24265123406

Group #
5546BUH

UnitedHealthcare \$10 / UnitedHealthcare / Private Insurance
P.O. Box 740800
Atlanta, GA 30374-0800

Payor ID:
Phone: 1-800-511-4747

SUBSCRIBER

First: Wilma
Last: Flintstone
Address: 479 Cocoa Avenue

Plymouth, VT 05056

Birth:
Sex: Female
Reln: Child

Start: 10/01/2006
End:

Employr:

Go Back

Policy
Log

Print
This

Policy Change Log for Pebbles Flinstone

guest1 Fri Apr 6 17:37:01 EDT 2007 ADDED Primary Policy

Copay Insurance Company

Certificate #

Group #

15.00 BCBS \$15 Custom Blue QAC,QAF

333333333

22222

PO Box 890062

Payor ID: SB865

Camp Hill, PA 17089-0062

Phone: 717-731-8080

SUBSCRIBER

First: Wilma

Birth:

Start: 01/01/2007

Last: Flintstone

Sex: Female

End:

Address: 479 Cocoa Avenue

Reln: Child

Plymouth, VT 05056

Employr:

guest1 Fri Apr 6 13:27:52 EDT 2007 MODIFIED Primary Policy

BEFORE:

Copay Insurance Company

Certificate #

Group #

10.00 Aetna MC \$10 Box 1125

8282452320302

413BC5

PO Box 1125

Payor ID: 60054

Blue Bell, PA 19422

Phone:

Quit

Search
Pattern

Who, When, What (a.k.a., the Blame Game)

Partner
sersname

Date and Time

Action Performed



guest1 Fri Apr 6 17:37:01 EDT 2007 ADDED Primary Policy

Added Policy

```
quest1  Fri Apr  6 17:37:01 EDT 2007  ADDED Primary Policy
Copay Insurance Company      Certificate #      Group #
15.00 BCBS $15 Custom Blue QAC,QAF  333333333      22222
  PO Box 890062                Payor ID: SB865
  Camp Hill, PA  17089-0062      Phone: 717-731-8080
SUBSCRIBER
  First: Wilma                  Birth:              Start: 01/01/2007
  Last: Flintstone              Sex: Female         End:
  Address: 479 Cocoa Avenue      Reln: Child
          Plymouth, VT  05056      Employr:
```

Modified Policy

quest1 Fri Apr 6 17:49:10 EDT 2007 MODIFIED Primary Policy

BEFORE:

Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC,QAF	333333333	22222
PO Box 890062	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-731-8080	
SUBSCRIBER		
First: Wilma	Birth:	Start: 01/01/2007
Last: Flintstone	Sex: Female	End:
Address: 479 Cocoa Avenue	Reln: Child	
Plymouth, VT 05056	Employr:	

AFTER:

Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC,QAF	444444444	22222
PO Box 890062	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-731-8080	
SUBSCRIBER		
First: Wilma	Birth:	Start: 03/01/2007
Last: Flintstone	Sex: Female	End:
Address: 479 Cocoa Avenue	Reln: Child	
Plymouth, VT 05056	Employr:	

Policy Log is Searchable

Search Pattern: bcbs

Search on whole words: No

Search Results

quest1 Fri Apr 6 17:49:10 EDT 2007 MODIFIED Primary Policy

BEFORE:

Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC,QAF	333333333	22222
PO Box 890062	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-731-8080	

SUBSCRIBER

First: Wilma	Birth:	Start: 01/01/2007
Last: Flintstone	Sex: Female	End:
Address: 479 Cocoa Avenue	Reln: Child	
Plymouth, VT 05056	Employr:	

AFTER:

Copay Insurance Company	Certificate #	Group #
15.00 BCBS \$15 Custom Blue QAC,QAF	444444444	22222
PO Box 890062	Payor ID: SB865	
Camp Hill, PA 17089-0062	Phone: 717-731-8080	

SUBSCRIBER

First: Wilma	Birth:	Start: 03/01/2007
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The Patient Recaller

- Generates Patient Lists
- Accepts a wide range of Inclusion and Exclusion Criteria
- Supports multiple output options, including form letters.
- List criteria can be saved and reused

Accessing the Patient Recaller

Patient/Account Reports	
Advanced Patient/Account Search	(findsm)
Patient Recaller	(recaller)
Active Patient Count	(src)
List Patients by Insurance Group	(srs)
List Patients by Insurance & PCP	(srs)
List Patients by Insurance Company	(listins)
List Patients In For A Procedure	(whoproc)
List Patients In For A Diagnosis	(whodiag)
Account Population by City	(cityreport)
Accounts by Status Flag	(cfs)

Recaller Criteria Selection

Recaller - Criteria Selection

Build a list of patients based on the following criteria:

*

- Include by Age
- Include by Appointment (All Providers)
- Include by Appointment and Provider
- Include by Birthday (Next)
- Include by Date Added to Partner
- Include by Date of Last Physical
- Include by Date of Last Visit**
- Include by Date of Physical Due
- Include by Diagnosis
- Include by Ethnicity
- Include by Flag - Account Flag
- Include by Flag - Patient Flag

Individual Criteria Example:

Recaller - Criteria Selection

Build a list of patients based on the following criteria:

Include by Date of Last Visit

Next Output Restore Criteria Save Criteria Report Details Use 'or' Criteria

Include by Date of Last Visit

in the past 3 yrs 0 mos
calculated from today

Press F7 to use specific dates (mm/dd/yyyy)

Next

Specific
Dates

Back

Recaller - Criteria Selection

2,094 Patients

1,184 Guarantors associated with these Patients

1,193 Custodians associated with these Patients

Build a list of patients based on:
the date they were last seen

and

Next

Output

Restore
Criteria

Save
Criteria

Report
Details

Use 'or'
Criteria

Back

Adding Additional Criteria

Recaller - Criteria Selection

2,094 Patients

1,184 Guarantors associated with these Patients

1,193 Custodians associated with these Patients

Build a list of patients based on:
the date they were last seen

and diagnoses

diagnoses they have had

in the past 3 yrs 0 mos
calculated from today

The following is a listing of Items/Groups that matched the Pattern entered. Select/Deselect items from the listing below.

- * 493.00 Asthma Extrinsic NOS (Major Diagnosis)
- * 493.00 Asthma Mild Intermit (Major Diagnosis)
- * 493.00 Asthma Mild Persist (Major Diagnosis)
- * 493.00 Asthma Mod Persist (Major Diagnosis)
- * 493.00 Asthma Sev Persist (Major Diagnosis)
- * 493.01 Status Asthmaticus
- * 493.01 ~Asthma Acute
- * 493.02 Asthma Extrinsic w/Acute Exacer
- * 493.10 Asthma Intrinsic NOS (Major Diagnosis)
- * 493.12 Asthma Intrinsic w/Acute Exacer
- * 493.22 Asthma Chron Obstr w/Acute Exac
- * 493.82 Asthma Cough Variant (Major Diagnosis)
- * 493.90 Asthmatic Bronchitis
- * 493.91 ~Status Asthmaticus

Process

Select

Select
All

Select
None



Recaller - Report Details

Criteria:

Build a list of patients based on
the date they were last seen
and diagnoses

Selections:

the date they were last seen
in the past 3 yrs
calculated from today

diagnoses they have had
in the past 3 yrs
calculated from today

diagnoses:

493.00	Asthma Extrinsic NOS (Major	493.00	Asthma Mild Intermitt (Major
493.00	Asthma Mild Persist (Major	493.00	Asthma Mod Persist (Major D
493.00	Asthma Sev Persist (Major D	493.01	Status Asthmaticus
493.01	~Asthma Acute	493.02	Asthma Extrinsic w/Acute Ex
493.10	Asthma Intrinsic NOS (Major	493.12	Asthma Intrinsic w/Acute Ex

Done

Jump to
Top

Jump to
Bottom

Send
To...

Search
Pattern

Recaller - Output

To save this report for future use, press **F4**.

425 Patients

330 Guarantors associated with these Patients

329 Custodians associated with these Patients

1. What type of output do you want?

- | | | |
|-------------------------------------|--------------------------------|----------------------|
| <input checked="" type="checkbox"/> | Patient List | Standard List |
| <input type="checkbox"/> | Form Letters | Patient Form Letters |
| <input type="checkbox"/> | Labels | Guarantor Labels |
| <input type="checkbox"/> | Subtotal by Age and Sex Report | |

2. How should the output be sorted?

- | | |
|-------------------------------------|------------|
| <input checked="" type="checkbox"/> | Last Name |
| <input type="checkbox"/> | Zip Code |
| <input type="checkbox"/> | Birthday |
| <input type="checkbox"/> | Birth Date |

Process

Save
Criteria

Report
Details

Back

Select Output Destination

Recaller - Output Selection

- X View on Screen
- Print
- E-mail
- Save to Workstation
- Save to 'srsfiles'

Achey, Diane	Custodian: Jeremy Achey	Phone: 802-474-7187
575 Old Ford Drive	Cabot, VT 05647	
Addington, Michael	Custodian: Jeffrey Addington	Phone: 802-130-6763
730 Grandview Drive	Saint Albans Bay, VT 05481	
Aftosmes, Lais T.	Custodian: Cheryl Aftosmes	Phone: 802-290-3167
Saint Albans Bay, VT	05481	
Alwine, Kyle	Custodian: Dawn Sweigart	Phone: 802-778-1654
83 Jury Street	Ely, VT 05044	
Amos, Dustin	Custodian: William L Amos	Phone: 802-380-2702
5735 Mapledale Road	Putney, VT 05346	
Anderson, Jennifer M	Custodian: Debra Anderson	Phone: 802-413-9166
734 North Street, Apt 5	Websterville, VT 05678	
Andrus, Eric	Custodian: Richard Andrus	Phone: 802-911-3478
46 Bonnywick Drive	Newport, VT 05855	
Ardire, Adrian	Custodian: Gerald Ardire	Phone: 802-327-8692
866 South 0th Street	Westfield, VT 05874	
Arndt, Chris	Custodian: Kevin Arndt	Phone: 802-453-8438
576 E Water Street	Richford, VT 05476	
Atnip, Andrew	Custodian: Connie Atnip	Phone: 802-782-5029
760 Snyder Drive	Hartland Four Corners, VT 05049	
Atnip, Melissa	Custodian: Connie Atnip	Phone: 802-782-5029
760 Snyder Drive	Hartland Four Corners, VT 05049	

Insurance Configuration Menu (insconfig)

- Central location for a variety of useful Insurance Configuration Tools
- Many of these tools are advanced, and merit training prior to use
- Contains configuration tools as well as reports

Insurance Configuration

F1	Edit Insurance Table	(ted)
F2	Override Provider ID#s by Insurance Batch	(provids)
F3	Edit I_ files	(ibar)
F4	HCFA Form Configuration	(hedfe)
F5	Edit Allowable/Contract Schedule	(allowedit)
F6	List Insurance Groups	(byins)
F7	List Insurance Plans by Insurance Batch	(bybatch)
F8	List Insurance Batches by ced Configuration	(bygenrc)

Edit

Override

Edit

Edit

Edit Fee

List

Inscos

Batch by

List Insurance Plans by Group (byins)

INSURANCE COMPANIES IN GROUP Medicaid

1.Collections
MEDICAID

INSURANCE COMPANIES IN GROUP Aetna USHC HMO

Aetna USHC HMO \$0 CHIP
Aetna USHC HMO \$10
Aetna USHC HMO \$10/10
Aetna USHC HMO \$10/15
Aetna USHC HMO \$10/25
Aetna USHC HMO \$14
Aetna USHC HMO \$15
Aetna USHC HMO \$15/20
Aetna USHC HMO \$16/21
Aetna USHC HMO \$17/22
Aetna USHC HMO \$18/30
Aetna USHC HMO \$20
Aetna USHC HMO \$2/5
Aetna USHC HMO \$30
Aetna USHC HMO \$5/10
Aetna USHC HMO \$5/15

List Insurance Plans By Batch (bybatch)

HCFA Batch 'Other HCFA Forms(other)' includes the insurance companies:

- Aetna PPO/ Watkins
- Auto/Related Private Insurance
- BCBS Basic Cov QBD
- Cigna Ins.
- Cigna Ins.20% all services
- Cigna PPO \$10
- Cigna PPO \$15
- Cigna PPO \$20
- Devon Health Services
- Fortis Insurance Company
- Fortis Insurance Company \$40
- GEHA/PHCS
- Great-West Healthcare
- Miscellaneous Insurance
- North American Health Plan/PHCS
- PHCS
- The Mega Life & Health Ins. Co.
- TriCare
- UnitedHealthcare
- UnitedHealthcare
- UnitedHealthcare \$10
- UnitedHealthcare \$15
- UnitedHealthcare \$15
- UnitedHealthcare \$15 TRV

Insurance Special Information Files (ibar)

- Configured with each plan in the ted Insurance Companies Table
- Editable manually (significant training required) or via the ibar program (recommended).
- Control the behavior of the various procedures when billed (and more...)

Special Information File (I-bar) Editor

I-bar File to Edit:

F2

Change Pending Status for All Procedures

F3

Change HCFA Batching Status for All Procedures

F4

Change Copay Information for All Procedures

F5

Change Base Fees for All Procedures

F6

Change WriteOff/Capitation Information for All Procedures

F7

List Insurance Companies Using Selected I-bar File

F8

Change All Above Settings for One Procedure

Change
Pending

Change
Batching

Change
Copay

Change
Base Fee

Change
WriteOff

Which
Insses

Change
All

Procedure Group	Code	Procedure Name	Pend Insurance
		TEMPLATE	Yes

Newborn Ca	99440	~Ewborn Resuscitatio	No
Newborn Ca	99440	Newborn Resuscitatio	No
Newborn Ca	99436	Attendance At Delive	No
Newborn Ca	99433	Newborn Care Subsequ	No
Newborn Ca	99431	Newborn Care Initial	No

Well Child	99395	HC 18 to 39 yrs	No
Well Child	99394	HC 12-17 yrs	No
Well Child	99393	HC 5-11 yrs	No
Well Child	99392	HC 1-4 yrs	No
Well Child	99391	HC under 1 yr	No

Well Child	99385	New HC 18 to 39 yrs	No
Well Child	99384	New HC 12-17 yrs	No
Well Child	99383	New HC 5-11 yrs	No
Well Child	99382	New HC 1-4 yrs	No
Well Child	99381	New HC under 1 yr	No

Misc Offic	99362	Medical conference	No
Misc Offic	99361	Medical Conference	No
Hospital P	99357	Prol Serv f2f IH Ad	No

Thanks For Coming!!!

